

How to Create a Document from a Template

TI version 10.8

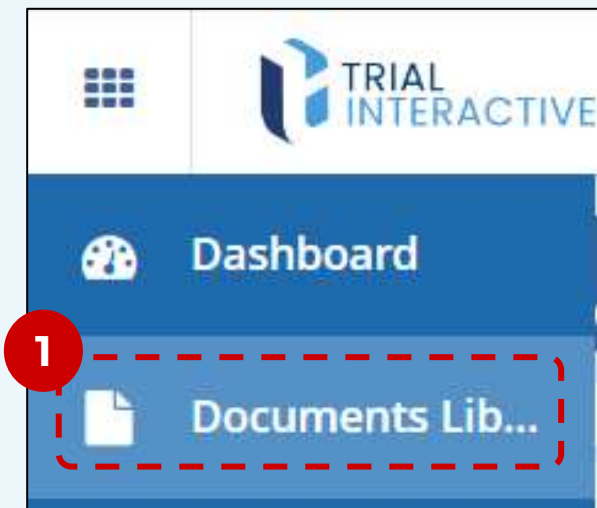
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

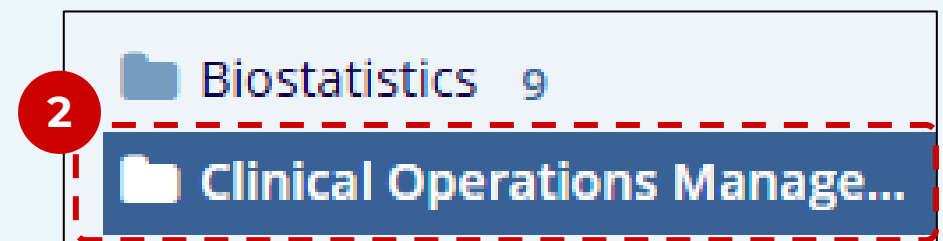


This feature must be configured before use and therefore may not be present in all rooms. In case of doubt, ask a Room Administrator.

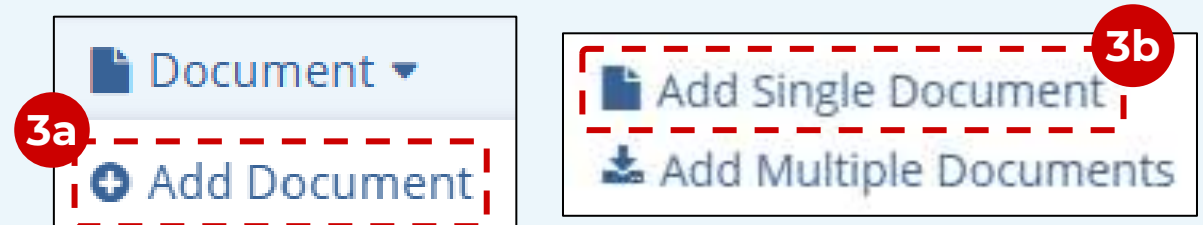
1 Navigate to the **Documents Library**.



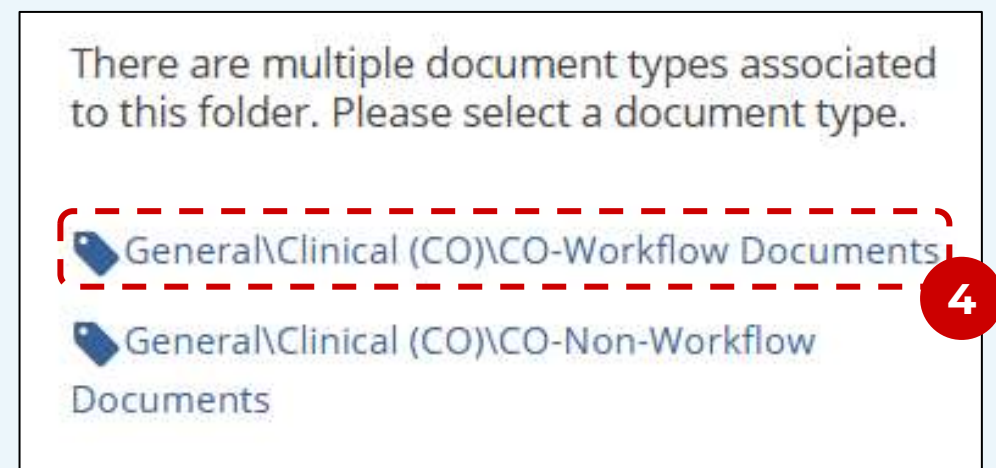
2 Select the folder where you wish to store the document.



3 Select a **single document** upload method.
(3b can be displayed by right-clicking the folder name.



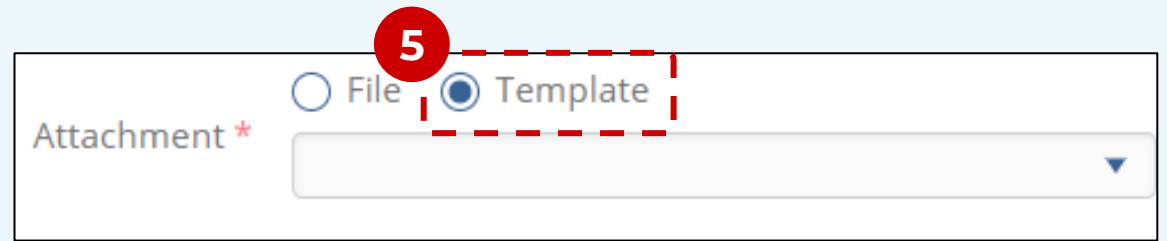
4 You may be prompted to select a document type. Just **click** on the option relevant to the document.



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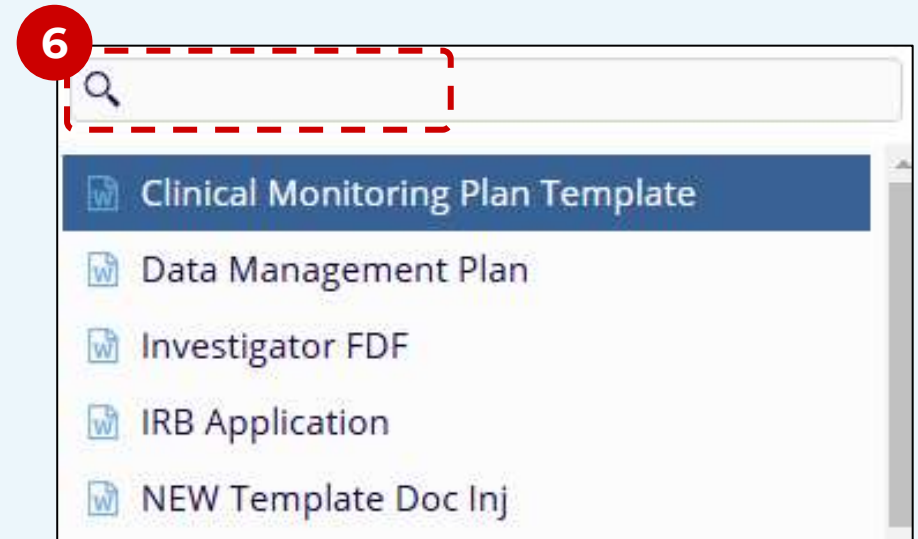
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5 At the Attachment field, select the radio button for **Template**.



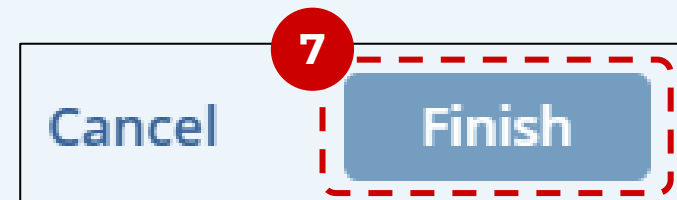
The screenshot shows a form field labeled "Attachment *". Above the field are two radio buttons: "File" and "Template". The "Template" radio button is selected and highlighted with a red dashed box and a red circle containing the number 5. Below the radio buttons is a dropdown menu.

6 Use the **Dropdown list** to select one of the available templates. You can also type to narrow your results.



The screenshot shows a dropdown list with a search bar at the top. The search bar is highlighted with a red dashed box and a red circle containing the number 6. Below the search bar is a list of templates, each with a document icon and a title. The first item, "Clinical Monitoring Plan Template", is highlighted in blue. The other items are "Data Management Plan", "Investigator FDF", "IRB Application", and "NEW Template Doc Inj".

7 Complete the rest of the metadata as usual. Click **Finish** to generate the document.



The screenshot shows two buttons: "Cancel" and "Finish". The "Finish" button is highlighted with a red dashed box and a red circle containing the number 7.



For info about filling in metadata, please see job aid: **Collaborate - How to Upload a Document.**